

ITPP Content (Template)

Note to Preparer: The ITPP content will be **scaleable** based on the acquisition considering such factors as project urgency, estimated dollar value, mission criticality, complexity, and project history. Less complex, lower dollar acquisitions will normally not require the level of detail that would be required for a major project.

Department contact information

Agency Name
Project Name
DOF Project No.
Name (of person responsible for developing the ITPP):
Title:
Office:
Address:
Agency Bill Code for this Project:
Phone Number:
E-mail Address:

Chief Information Officer (CIO) Name: _____
(Or highest ranking official if no CIO)
Chief Information Officer (CIO) Signature _____
Phone Number: _____

Description of project

The following table lists what should be included in the description of the project.

- Briefly describe and discuss the project.
 - Indicate whether the project requires commercial-off-the-shelf (COTS), modified-off-the-shelf (MOTS), or custom software development. Estimate the percentage of each.
 - Indicate whether the project requires integration or whether the project is a stand-alone system with minimal integration.
 - Briefly describe the system maintenance strategy.
 - Indicate whether the project involves state databases and/or legacy systems.
 - Indicate whether the project uses an existing state data center or another site.
 - Briefly describe background and contracting history, i.e., previous purchase and dollar amount, competitive or non-competitive purchase, etc.
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Market research

Market research is critical in determining the selection of the appropriate procurement methodology. The extent of the research depends on such factors as urgency, estimated dollar value, complexity and past experience. Briefly describe the extent and results of the market research, documenting:

- Functional requirements of the product(s)/service(s) to be acquired.
 - The results and effect of market research in formulating the requirements.
 - Prospective sources that can meet the business/project objectives and cost or price estimates developed.
 - Efforts to achieve certified Small Business (SB) and certified Disabled Veteran Business Enterprise (DVBE) goals
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Acquisition methodology steps

The following information should be included in the Acquisition Methodology section:

- Indicate the acquisition methodology, i.e., competitive bid, leveraged procurement. Describe other areas of the acquisition(s) that need to be addressed upfront.
 - Indicate estimated pre-solicitation key action dates, i.e., completion dates for statements of work, technical requirements and evaluation factors and values, and solicitation key action dates, i.e., solicitation release date and contract award date. Additionally, identify schedule for obtaining adequate funds, i.e., BCP and any financing (GS \$SMART).
 - Describe the evaluation approach for the specific acquisition. If value effective, describe the evaluation factors that will be considered. As a matter of DGS policy, cost must be at least 50% of the weighted score.
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- Indicate types of IT goods/services, procurement vehicle/quantity, and contract dollar values. For instance, there are a number of acquisition components embedded in an IT project, e.g., Feasibility Study Report, in some instances a Special Project Report, Independent Validation and Verification, and Independent Project Oversight, procurement services, as well as Design, Development and Implementation (D, D, and I). You may use a matrix to display this information, such as the following example:

Types of IT Goods/Services (Breakout onetime and continuing hardware, software, and services)	RFP/ IFB	CMAS/ MSA/IAA	Qty	Contract \$ Value
IV&V/IPOC		MSA	1	\$100,000
Develop FSR		CMAS	1	\$80,000
Design, Dev, & Implementation	RFP		1	\$600,000
Total				\$780,000

- Indicate the contract(s) term, including maintenance years.

Procurement risk management

Describe methods to protect the State's investment and ensure adequate contractor performance. For instance:

- Payment holdbacks and performance bond requirements to ensure system development, implementation and integration are successful (refer to Public Contract Code Section 12112).
- Warranty provisions, liquidated damage provisions, or other insurance requirements.
- Other aspects of the contractual relationship that create or mitigate risk.

Contract management approach

Describe how the agency will administer and manage the acquisition once a contract is awarded. For instance:

- Reporting contractor deficiencies
- Contract changes and amendments
Reporting to internal management (and PD-TAS if requested) the status of problems, issues, and any condition requiring any amendment to the contract(s).
- Provide name, title, and phone number of the assigned representative(s) responsible for implementing the department's contract management approach.